

“Entering into the CRM world, we really didn't have any idea of what the solution was going to look like. We just drew up ideas for what we wanted our technology platform to do for our clients and for our business in general, and threw it all in the hopper.”

It was Kewl Consulting who helped sift those expectations into priority categories and linking structures — some directly through Creatio and others through supporting software and website applications — to achieve a mix of technologies that produce as many of the outcomes initially desired as possible. Some of them are the customers' ease of use; borrower triage; adaptability; consolidation of information (and its use to improve practices), and more “granular” reporting to the Tribes and investors.

NCC says they felt internal pressure to move quickly, to get the merger smoothed out and all their business lines working together asap. But when you don't know what you don't know, everything seems to take longer to accomplish than you had thought it would.

“We spent a lot of time hashing out the processes. The Kewl team did a really good job of simplifying the procedure to create and maintain consistency as we went along. They made needed information available appropriately to our employees, as they said they would, in a timely manner. Throughout the project, all the work has been well documented.”

HOW TO MAKE THE PROCESS EASIER

Saving time is one of NCC's key metrics, of course, along with greater effectiveness and efficiency in service to customers' wants and needs. For instance, previously it took several hours to sift through various documents and search for all the information needed just to fill in the loan summary. Given that their merger partners used different formats in the past, that has meant comparing dissimilar data, further lengthening the amount of time required.

With Creatio and other apps, such summaries — and underwriting reports — can be ready in minutes instead of hours. That is a big reduction in the amount of time required to grant approvals for small, uncomplicated loans.



